CYMS Orientation & Overview

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Today's Schedule

1000-1200 CYMS Orientation & Overview

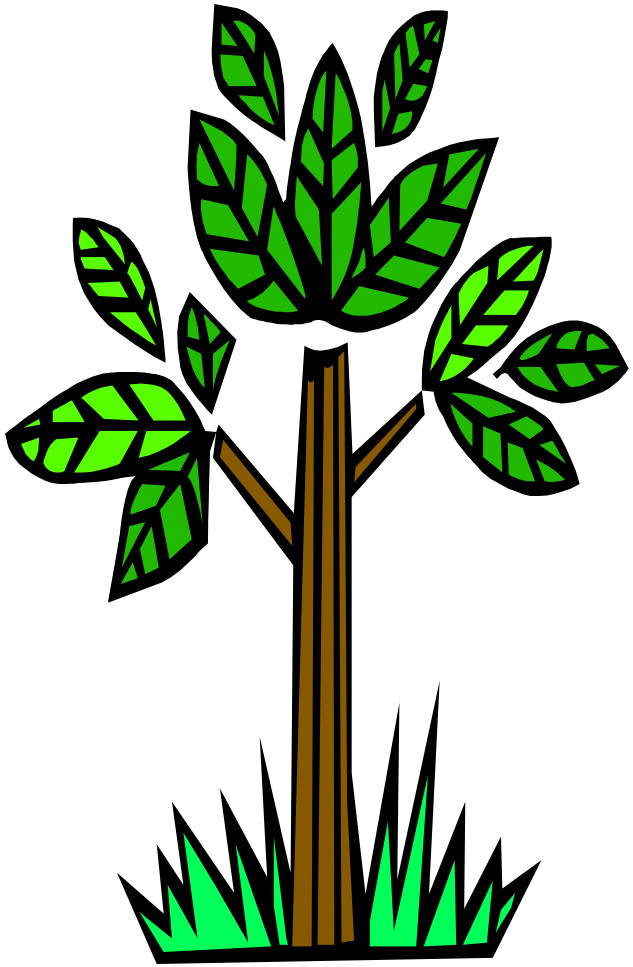
1300 – 1700 Household & Pass Class

Deployment Timeline

Complete Datasheets
Orientation
HH Pass Class
Data Input
Week “2” Training
Complete Data Input
Practice
“Go Live”

CYMS RESPONSIBILITIES

- **For Success, <u>Everyone</u> Must Contribute:**
  - ISO / DOIM
  - CYS Coordinator
  - CYMS POC / CYS Tech
  - Central Registration Staff
  - Program Managers
    - CDC, SAS, CLEOS
    - FCC, MST, Sports
  - Program Clerks
  - TACS/TAPS
  - Others: Parents, Agencies, ???



ISO RESPONSIBILITIES

- **Maintain CYMS server**
- **Install CYMS on all CYS PC's**
  - CDC, SAS, FCC, CLEOS, TACS/TAPS, YS
  - Front desk + management/admin stations
- **Load CYMS updates on server & all PC's**
- **Provide network access/ID's for CYMS users**
- **Troubleshoot hardware/connectivity issues**
  - Liaison with DOIM and VSI as required
- **Backup CYMS database** (2-3 times daily)

CYS COORDINATOR RESPONSIBILITIES

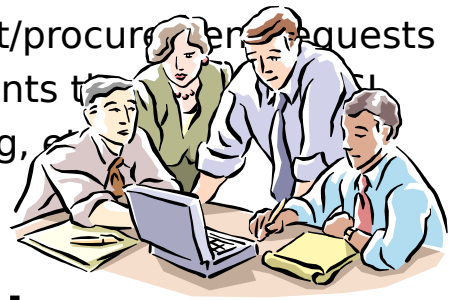
- **Budget for CYMS**
  - Equipment (maintenance, upgrade, replacement, supplies)
  - Adequate staff (clerks, techs, etc) + staff training (local + TDY + contract)
- **Ensure dedicated staffing & sufficient training / backup**
  - Designated CYMS POC (or CYS Tech) + 2 cross-trained backups
  - Initial training, cross-training and backup layers for all CYMS functions (mgrs, asst mgrs, clerks, TACS/TAPS, Central Reg, FCC, YS, CLEOS, SLO, CYS admin, etc)
  - Regular CYMS meetings to ensure coordinated efforts
- **Maintain CYMS liaison with IS er, CFSC**

- **Establish clear roles/responsibilities/policies--who can/should:**
  - Make adjustments to DARs or parent fees/accounts and why
  - Make payment reversals and why
  - Run installment billing process
  - Have access to different modules
  - Update HH data Etc

CYMS POC (or Tech) RESPONSIBILITIES

- **Ensure comprehensive staff orientation / training / backup**
  - Orient new employees, assign CYMS ID, teach navigation, define responsibilities
  - Provide or facilitate ongoing instruction and reinforcement: hands-on, desk side, workshop, training guides, “field trips,” quizzes, contract, forums, networking
  - Coordinate CYMS efforts: meetings, observations, role clarification, etc
  - Ensure backup for all CYMS functions (mgrs, asst mgrs, clerks, TACS/TAPS, CR, FCC, YS, CLEOS, SLO, CYS admin, CYS coord, etc)

- **Troubleshoot problems (hardware/software/policy/procedure)**
  - Fix or liaison with ISO/DOIM/local command/support agencies/CFSC/VSI to resolve
  - Evaluate physical setup and hardware requirements
  - Contribute detail input on CYMS requirements for budget/procurement requests
  - Forward requests for software fixes, reports, enhancements t
  - Share good ideas with CFSC (guides, procedures, training, e

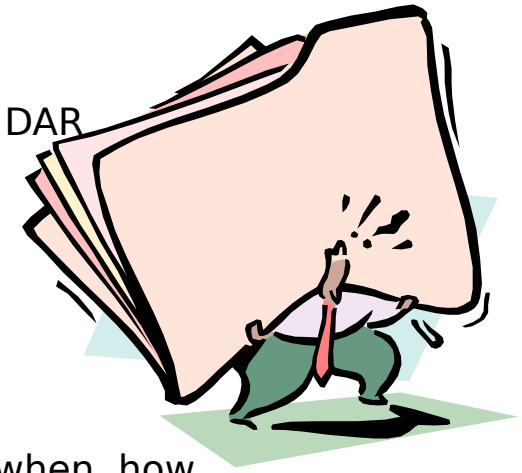


- **Perform (or oversee) recurring procedures**
  - Update setup tables, pick lists and CYMS user IDs (as required)
  - Oversee installment billing & daily financial procedures
  - Conduct EOM / EOY / Annual Report procedures

CENTRAL REGISTR. RESPONSIBILITIES

- **Revise registration procedures to include CYMS**
  - Let CYMS work for you (tracking, reminding, streamlining, standardizing, etc)
    - Search for Care / Wait List
    - Pass renewals, overdue shots, FCP, health assessment, etc.
  - Review physical office setup (to include adding patron self-registration stations)
  - Conduct desk-side interviews (balance appointments vs. walk-ins)
  - Reduce registration paperwork (use profile print with coversheet as file)

- **Build the CYMS database**
  - Input initial household data (sponsor, spouse, child)
  - Issue annual passes, collect registration fees, produce DAR
  - Issue swipe cards (if appropriate)
  - Enroll children in activities or place them on wait lists
  - Input or oversee ongoing activity setup and rosters

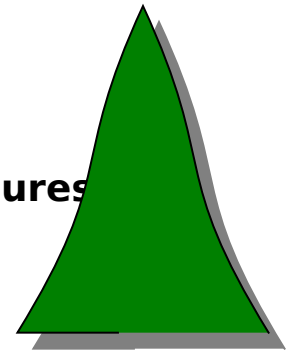


- **Keep the database current**
  - Clarify roles with CDC/SAS/FCC on who updates what, when, how
    - Phone #s, contacts, shots, income, etc
    - Transitions (room to room)
    - Vacancy notification
  - Monitor/process annual pass renewals
  - Retire rosters to history as required
  - Conduct year end and periodic procedures to evaluate, update or clean database (retire UU files to history, update setup tables, run annual reports, etc)

PROGRAM MANAGER RESPONSIBILITIES

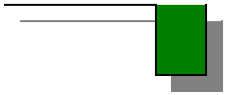
- **Evaluate and improve CYMS operational environment**
  - Physical space (clerk work space, patron traffic patterns)
  - Sufficient operational hardware/supplies (PC's, swipe stations, cash drawers)

- **Oversee ongoing CYMS operations**



  - **Ensure CYMS is operational daily IAW established procedures**
    - Trained staff and adequate layers of backup
    - Keep own skills current to manage or serve as backup

  - **Monitor database (coordinate with Central Reg on roles/rqmts)**
    - Activity/classroom/team/club/council setups
    - Cost center/payment code/fees/GLAC/USDA setup
    - Activity rosters, transitions, vacancies
    - HH updates (address, phone, contacts, shots, illness, etc)



  - **Monitor financial operations (critical requirement !!!!)**
    - Authorize payment reversals and parent account adjustments
    - Run or verify DARs – submit with no pen & ink changes
    - Oversee billing/payment/cashier procedures
      - Spot check for correct fees
      - Ensure trial balances goes to zero monthly
      - Ensure all errors are corrected on day the occur

PROGRAM MANAGER RESPONSIBILITIES (2)

- **FCC Program Directors (special notes)**
  - Use CYMS to manage all aspects of FCC program (replace old systems with CYMS)
  - Log personal information on providers during initial orientation
  - Track certification and ongoing requirements through CYMS:
    - Background checks, operational requirements, inspections
    - Provider/pet health records
    - Home visits, training, subsidies . . . etc.
  - In conjunction with Central Registration
    - Ensure providers are properly set up (the “magic C”) to receive referrals
    - Ensure referrals are posted in CYMS
    - Ensure rosters (enrollments in homes) are kept current
    - Ensure feedback on overdue requirements (shots, annual registr and household file updates
  - Use CYMS to assist with USDA tracking and attendance posting

- **Youth Program Directors (special notes)**
  - Swipe in/out is different at YS – ensure setup and use of CYMS
  - Volume count at door each day; not into specific activities like CDC/SAS

PROGRAM CLERK RESPONSIBILITIES

- **Help maintain the household database**
  - Enter changes in address, phone, emergency contacts
  - Coordinate with Central Registration on changes in income, new family members, shots, special needs, printing/distributing cards (decide who does what and when)
  - In conjunction with Central Registration, process or refer transitions/new enrollments and identify vacancies
  - Use CYMS to log illness records for children (phase out old methods)

- **Monitor swipe stations**
  - Monitor parent or child swipe in/out. Don't mis-use bulk sign-in/out.
  - Ensure all parents follow established procedures
  - Notify parents of ticklers or comments (shots, FCP, pass, illness flag, etc)
  - Refer "processing problems" or "overdue requirements" to manager for resolution. If you ignore the flags, they become a worthless feature !!!

- **Take payments / process financial paperwork**
  - Learn and follow the established procedures for payment, reversals, daily closeout, DAR – practice them often in demo. Be methodical – too fast = errors.
  - Correct errors on the day you make them. Don't let them build up !!!
  - DARs should go forward with NO pen and ink changes.
  - Be sure you have cross-trained backups available. CYMS must run daily !!!

TACS/TACS RESPONSIBILITIES

- **Work with CYS admin/managers to ensure all new staff, volunteers, contractors are initially entered into CYMS**
  - Define roles – who enters/maintains/has access to what data:
    - Personnel action information (grade, title, series, funding source, assignment, admin actions, etc)
    - Personal information (address, phone, emergency contacts, health, background checks, etc)
    - Other annual report information (education, military spouse, etc)
    - Training/recognition/credential records
    - Observations, visits, counseling, reviews
- **Transition from current manual systems to automated**
  - Take at least 5 current staff and track all of the[illegible]nition actions through CYMS
    - Expand this number as you become more familiar [illegible]
      - Start new staff off in CYMS
    - Learn to let CYMS work for you:
      - Who is due/overdue for training

OTHER RESPONSIBILITIES

- **Parents**
  - Swipe in/out through CYMS
  - Keep household records current
  - Take appropriate action when flagged by CYMS about overdue requirements (shots, health assessment, family care plan) or reminders (upcoming registration, etc)
  - Make payments on time to avoid penalty fees
  - Give sufficient notice on withdrawals, leave, etc.
  - Update wait list status IAW local procedures

- **Agencies**
  - Reevaluate current hourly and STACC arrangements/ procedures to let CYMS facilitate the tracking/billing process
  - Reevaluate inspection procedures to use CYMS for screening, obtaining data and evaluating operations